

INDIVIDUAL PERFORMANCE REVIEW

UTAH STATE OFFICE OF EDUCATION

EMPLOYEE NAME: _____ EIN: _____ DATE: _____

Annual Report _____ **X** _____ Probationary Report _____ Other _____

INSTRUCTIONS

1. The performance plan should be developed at the beginning of the performance period and signed off by the employee and the supervisor.
2. Each employee is to receive an overall rating of either Outstanding, Highly Successful, Successful, Below Successful, or Unsuccessful.
3. The overall performance rating should be based on the combined overall rating of the job specific performance criteria and the successful performance criteria. **A written explanation must be given for any rating except Successful.**
4. When rating an employee's performance, the supervisor should select the rating scale in each category which reflects most closely the employee's actual behavior or performance on that criterion or performance objective.
5. The supervisor should also complete the narrative sections on the form identifying examples of professional qualities and work well done, and areas for improvement.
6. The Performance Review form is to be signed by both the supervisor and the employee in two separate sections: at the end of the performance plan after the employee and supervisor meet to discuss the performance plan at the beginning of the performance period; and on the front page after meeting to discuss the performance rating.

OVERALL PERFORMANCE RATING (Check one)

☐ Outstanding

☐ Highly
Successful

☐ Successful

☐ Below
Successful

☐ Unsuccessful

NARRATIVE SECTIONS

☐ Examples of professional qualities and work well done:

- ☐ Areas for continuing development:

- ☐ Employee comments:

SIGNATURES FOR PERFORMANCE RATING:

- Employee Signature:

Agree Disagree

Date:

☐ ☐

- Supervisor Signature:

Date:

DISTRIBUTION: Original: Personnel File Copy: Employee Copy: Supervisor

PERFORMANCE PLAN (To be developed and signed at beginning of plan period)

JOB SPECIFIC PERFORMANCE CRITERIA

TITLE OF POSITION:

1. OBJECTIVE 1 (Describe Job Function):

- ☐ OUTSTANDING - Unique and exceptional performance and/or accomplishments.
- ☐ HIGHLY SUCCESSFUL - Clearly and consistently above what is required for the job.
- ☐ SUCCESSFUL: Meets the requirements of the job in all respects. (Describe Successful Expectations for this Objective):
- ☐ BELOW SUCCESSFUL- Marginal performance, fails to meet some significant job requirements.
- ☐ UNSUCCESSFUL - Clearly inadequate performance.

EXPLANATION OF RATING: (Required for any rating except Successful.)

2. OBJECTIVE 2 (Describe Job Function):

- ☐ OUTSTANDING - Unique and exceptional performance and/or accomplishments.
- ☐ HIGHLY SUCCESSFUL- Clearly and consistently above what is required for the job.
- ☐ SUCCESSFUL: Meets the requirements of the job in all respects.(Describe Successful Expectations for this Objective):
- ☐ BELOW SUCCESSFUL - Marginal performance, fails to meet some significant job requirements.
- ☐ UNSUCCESSFUL - Clearly inadequate performance.

EXPLANATION OF RATING: (Required for any rating except Successful)

3. OBJECTIVE 3 (Describe Job Function):

- ☐ OUTSTANDING - Unique and exceptional performance and/or accomplishments.
- ☐ HIGHLY SUCCESSFUL - Clearly and consistently above what is required for the job.
- ☐ SUCCESSFUL: Meets the requirements of the job in all respects. (Describe Successful Expectations for this Objective)
- ☐ BELOW SUCCESSFUL - Marginal performance, fails to meet some significant job requirements.
- ☐ UNSUCCESSFUL - Clearly inadequate performance.

EXPLANATION OF RATING: (Required for any rating except Successful)

4. **OBJECTIVE 4 (Describe Job Function):**

- ☐ **OUTSTANDING** - Unique and exceptional performance and/or accomplishments.
- ☐ **HIGHLY SUCCESSFUL** - Clearly and consistently above what is required for the job.
- ☐ **SUCCESSFUL**: Meets the requirements of the job in all respects. (Describe Successful Expectations for this Objective)
- ☐ **BELOW SUCCESSFUL** - Marginal performance, fails to meet some significant job requirements.
- ☐ **UNSUCCESSFUL** - Clearly inadequate performance.

EXPLANATION OF RATING: (Required for any rating except Successful)

STANDARD PERFORMANCE CRITERIA

1. **TECHNICAL EFFECTIVENESS**

- ☐ **OUTSTANDING** - Meets all the criteria for highly successful performance as well as applying sound technical approaches to areas of responsibilities; keeping abreast of and uses relevant state-of-the-art practices; viewed as technical resource by other staff; mentors demonstrated knowledge to team members, and develops training to teach the skills learned to team members.
- ☐ **HIGHLY SUCCESSFUL** - Meets all the criteria for successful performance as well as keeping abreast of relevant state-of-the-art practices; meets and exceeds personal career development goals; takes initiative to develop a new skill and shares with peers.
- ☐ **SUCCESSFUL** - Meets all job responsibilities with quality, timeliness, accuracy. Maintains necessary skills and uses relevant practices in their field.
- ☐ **BELOW SUCCESSFUL** - Only with close supervision and monitoring, adequately performs job responsibilities with quality, timeliness, accuracy; or demonstrates minimal quality, timeliness and accuracy in performing work.
- ☐ **UNSUCCESSFUL** - Lacks quality, timeliness and accuracy in performing work.

EXPLANATION: (Required for any rating except Successful)

2. **PLANNING AND ORGANIZATION**

- ☐ **OUTSTANDING** - Meets all the criteria for highly successful performances as well as demonstrating performance in the following areas: Implements action plan and continually mentors peers to continue to achieve desired outcomes, implements process, trains, and mentors peers as directed by supervisor. Accepts responsibility for team improvement while looking at ways to continually build upon the accomplished projects/goals through even better methods.
- ☐ **HIGHLY SUCCESSFUL** - Meets all the criteria for successful performance as well as demonstrating performance in the following areas; develop action plans to improve teams knowledge, skills, and abilities on specific process/procedures, provides a viable solution/process for overall improvement.
- ☐ **SUCCESSFUL** - Meets all job responsibilities assessing needs, analyzes data, prioritized activities, evaluates results and revises approaches (as needed) when planning to accomplish work assignments. Uses effective time management strategies to achieve acceptable results in most situations.
- ☐ **BELOW SUCCESSFUL** - Only with close supervision and monitoring, uses planning and organization skills to accomplish work assignments; or uses minimal planning and organizational skills and takes more time and help than necessary to accomplish work assignments.
- ☐ **UNSUCCESSFUL** - Does not use planning and organizational skills; work assignments are disorganized, disjointed, confusing or distracting.

EXPLANATION: (Required for any rating except Successful)

3. **ORGANIZATIONAL COMMITMENT**

- ☐ **OUTSTANDING** - Meets all the criteria for highly successful performances as well as uses every opportunity to represent the Board and Office of Education in a positive perspective with the public, co-workers, school district staff, and customers, and to further the mission and goals of the Board and Office (as well as supports others in their efforts to positively represent the Board and Office).
- ☐ **HIGHLY SUCCESSFUL** - Meets all the criteria for successful performance as well as; represents the Board and Office of Education in a positive perspective with the public, co-workers, school district staff, and customers to further the mission and goals of the Board and Office.
- ☐ **SUCCESSFUL** - Demonstrates knowledge and acceptance of Board and Office values, mission, policies, and procedures; exhibits behavior consistent with and assists with implementation of Board and Office procedures.
- ☐ **BELOW SUCCESSFUL** - Only with close supervision, demonstrates acceptance of and exhibits behavior consistent with Board and Office values, mission, policies, procedures; or demonstrates minimal acceptance and occasional lack of support for Board and Office values, mission, policies or procedures.
- ☐ **UNSUCCESSFUL** - Does not support the accomplishments of the goals, policies, and programs of the Board or State Office.

EXPLANATION: (Required for any rating except Successful)

4. **INTERPERSONAL COMMUNICATION**

- ☐ **OUTSTANDING** - Meets all the criteria for highly successful performance as well as demonstrating performance in the following areas: mentors, helps peers to reach the same level where peer becomes a mentor; accepts feedback from team members and corrects the behavior; actively participates in developing, implementing, accomplishing, and evaluating the desired goals/projects set by the team.
- ☐ **HIGHLY SUCCESSFUL** - Meets all the criteria for successful performance as well as demonstrating performance in the following areas: helps team members without being solicited, solicits other team members to listen to and evaluate opinions and receives feedback open mindedly, comes prepared to present ideas/concepts to improve pathways, goals for the office or team.
- ☐ **SUCCESSFUL** - Interacts in a positive, constructive, and facilitative manner. Supports others in reaching their full potential; consistently behaves in a manner that is facilitative, empowering, caring, respectful, and supportive of others
- ☐ **BELOW SUCCESSFUL** - Only with close supervision and monitoring, demonstrates adequate interpersonal skills and the ability to work with others effectively; or demonstrates minimal interpersonal skills in communicating with others.
- ☐ **UNSUCCESSFUL** - Interacts inappropriately; lacks skills and ability to communicate and interact effectively.

EXPLANATION: (Required for any rating except Successful)

5. **CUSTOMER SERVICE**

- ☐ **OUTSTANDING** - Meets all criteria for highly successful performance as well as demonstrates performance in the following areas: Anticipates customer needs. Consistently goes the extra mile or is willing to make the extra effort to provide services to customer. Serves as go-between.
- ☐ **ABOVE SUCCESSFUL** - Meets all the criteria for successful performance as well as demonstrating performance in the following areas: Exceeds promised service to customers; provides quick and thorough service for customer's requests, problems or needs. Seeks help from other resources. Goes beyond normal job requirements to help customer.
- ☐ **SUCCESSFUL** - Provides services to customers as promised, updates voice mail messages, returns customer messages in a timely manner, give customers full attention providing basic services, quickly answers customer requests or questions. Satisfies, but does not exceed, customer expectations.
- ☐ **BELOW SUCCESSFUL** - Only with close supervision and monitoring, acts in accordance with professional ethics or principles consistent with agency mission and goals.
- ☐ **UNSUCCESSFUL** - Presents a negative image for the agency through unprofessional and unethical behavior.

EXPLANATION: (Required for any rating except Successful)

6. **PROFESSIONALISM AND ETHICS**

- ☐ OUTSTANDING -
- ☐ ABOVE SUCCESSFUL - Meets all the criteria for successful performance as well as consistently acts in accordance with professional ethics or principles which further agency missions and goals, and upholds the public trust.
- ☐ SUCCESSFUL - Consistently acts in accordance with professional ethics or principles consistent with agency mission and goals, and upholds the public trust.
- ☐ BELOW SUCCESSFUL - Only with close supervision and monitoring, acts in accordance with professional ethics or principles consistent with agency mission and goals.
- ☐ UNSUCCESSFUL - Presents a negative image for the agency through unprofessional and unethical behavior.

EXPLANATION: (Required for any rating except Standard)

SIGNATURES FOR PERFORMANCE PLAN:

Employee Signature:

Date:

Supervisor Signature:

Date: